



# Instruction Planner<sup>TM</sup>

## Teacher Guide

### Terms and Conventions

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- Unit Plan:** All daily lessons are created within a Unit. This can be a Unit of time (April 20 – 24), a textbook Unit (Chapter 4: The American Revolution), or a concept/content Unit (Rocks and Minerals). A Unit can be as short as a day or as long as an entire year. A Unit must have a title, be associated with a class, as well as a start date and an end date.
- Daily Plan:** Daily Plans are designed to guide, monitor, and track instruction on a daily basis. The Elements in a Daily Plan can be printed in an Elements Report to identify what is planned within a Unit and what actually occurred in the classroom.
- Elements:** Elements are the instructional core of a Unit. Elements in a Unit Plan are used to guide the development of a Unit (Unit Description, Enduring Understandings, Objectives) while Elements in a Daily Plan help track and monitor daily instruction (Strategies, Activities, Accommodations, Differentiation). Elements can be a text box, a bulleted or numbered list, a checkbox, or a drop-down list. Any number of Elements can be created and named for their intended use (Strategies, Reflections, Resources, etc.). Elements that contain a bulleted list, numbered list, checkbox, or drop-down are tracked by the system through the Daily Plan. Only individuals with administrative rights can design Elements. Elements are not transported to Curriculum Mapper®.
- Template:** Elements are used to build Templates teachers may use to construct Units. Several different Templates can be developed for various grade levels or instructional areas (Primary Template, Special Education Template, P.E. Template, Understanding by Design, etc.) or one Template can be created to guide the entire district. If no Templates are created, Units will consist of only Content, Skills, and Assessment. There are Unit Templates and Daily Templates. As teachers enter information or check off items in the Daily Plans, the system tracks that information so teachers can see those aspects of their teaching. Teachers can also create their own Templates if this is permitted by the Administrator.
- Share:** Any Unit can be shared with other teachers in the building. If a teacher shares a Unit, other teachers will have access to the Unit and can collectively build that Unit together. NOTE: If a teacher deletes information in a Shared Unit, that information is deleted for all teachers sharing that Unit. This is real time and does not require teachers to physically be in the same room or work at the same time. Once the Unit is built, teachers sharing the Unit must copy the Unit into their own accounts in order to work on their Daily Plans.
- Block:** Blocks are created within the Content, Skills, and Assessment section of the Unit/Daily Plan. Blocks are used to segment instruction, identify areas of emphasis, or place instruction within a specific timeframe. A Unit can be placed within one Block or any number of Blocks, depending upon the user. Blocks can be named for easy reference. In Language Arts, blocks can be useful in separating Reading, Writing, Listening, and Speaking while keep all of Language Arts within a Unit.

**Structure:** The outline Structure of the Content and Skills columns is pre-set. The Structure is:

- A. Level 1
- 1. Level 2
- a. Level 3

Whatever is entered in the Content column is automatically duplicated in the Skills column in order to maintain consistency and ensure that each column aligns with the other. The Assessment column is different in that it does not follow the same Structure. It is not necessary to use all three levels. However, once the depth has been determined, it must be used throughout that block. Assessments are typically grouped and this is how Instruction Planner was designed.

**Publish:** A school or district may want to create model Units which can be used by teachers throughout the school or district. These Units are created by one or more individual, saved, and then Published to the school or district Document Library where they can be copied into a teacher's Unit Plan List. Any Unit can be Published, but only by individuals that have administrative access to Instruction Planner.

## Operational Considerations

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**School Courses** All School Courses must be established before teachers can enter Units. The process identical to setting up Courses in Curriculum Mapper. Course Name, Course Number, and Grade Level are required fields. It is recommended that a Subject Area be included. If a Course can be taken by students in more than one grade, then all possible grades should be checked.

**Class Setup** Before a Unit can be created, teachers need to set up their classes. The class will be selected from the drop-down list. If there are multiple sections (Periods), the sections need to be added one at a time. If Units are to be exported to Curriculum Mapper, the name of the course in Instruction Planner must match the course name in Curriculum Mapper.

**Document Library** Files can be attached to Instruction Planner in a variety of areas, making it useful as a repository for items used to teach, reinforce, or assess. Instruction Planner allows multiple documents to be attached at the same time.

**Standards:** It is necessary to Add Standards to the Unit or Daily Plan in order to attach Standards to a Unit. Standards from multiple grade levels and subject areas can be added to the Unit. Standards can only be attached in the Content, Skills, and/or Assessment areas.

**Edit Block** In order to work with any Element, or the Content, Skills, and Assessment areas, it is necessary to Edit the section or Block. Only one area can be edited at a time. Any area being edited has a green border. Once an Element or Block is being edited, the options are: Save, Save and Close, and Close without saving.

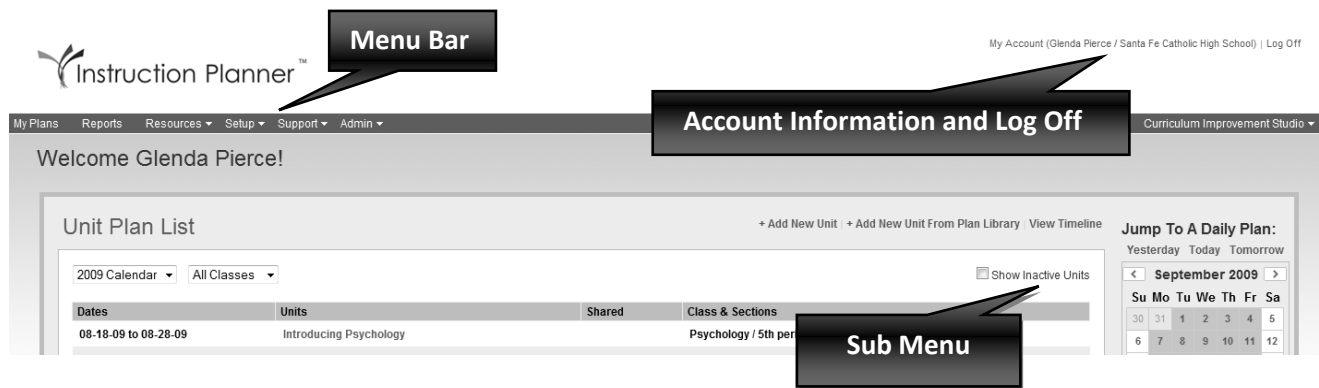


**Copy:** If a Unit is being shared, teachers will need to copy the Unit into their accounts in order to begin putting information into their Daily Plans. Units also can be copied from one year to another.

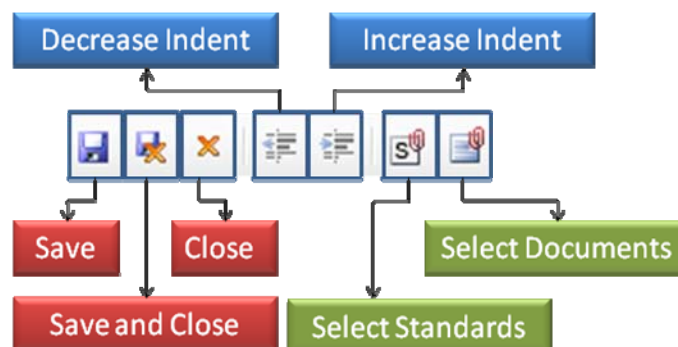
**Shift:** Whole Units or parts of Units can be shifted to earlier or later dates. This feature is useful if previous Units run longer than anticipated. Teachers can move (shift) the Unit forward to establish a new start date. If school is cancelled for a day, any part of a Unit not yet taught can be moved to show that no teaching occurred on that date.

## Menus and Toolbars

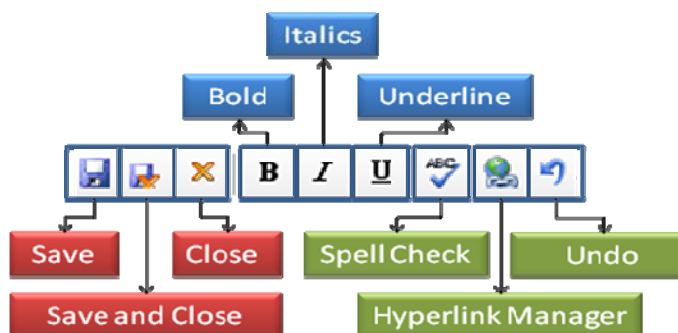
### Unit Plan List Menu



### Content, Skills, Assessment Tool Bar



### Text Element Tool Bar



## My Plans

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### Unit Plan List

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1. Click **My Plans** from the Menu Bar. (In the Unit Plan, Daily Plan, Reality Check, or Send To Curriculum Mapper view, click **My Plans** or **<Back to My Plans**).

### Add New Unit

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1. In the **Unit Plan List**, on the Sub Menu, click **Add New Unit**.
2. In the pop-up window, enter a Title.
3. Select the Class from the drop-down list.
4. Confirm the Sections to be included in this Unit. Instruction Planner automatically checks all sections. Uncheck any section that will not be included in the Unit.
5. Select a created Template to be used for the Unit from the drop-down list. If no template has been created, select Blank. School-wide templates are created by the Instruction Planner administrator.
6. Select the School Calendar from the drop-down list.
7. To set the Start Date and End Date of the Unit, click the Calendar icon under Start Date. In the pop-up window, click on the date the Unit begins and click on the date the Unit ends. If an incorrect Start or End Date is selected, click on **Reset**; click on the correct date.
8. Click **Submit Dates**.
9. Click **Add Unit**.

Note: You must establish a class before adding a Unit. See section on **Setup** for specific instructions.

### Blocked Dates

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1. If a day in the range of dates has been blocked, a message will appear. If the blocked date is NOT to be included in the Unit, click in the checkbox. To include the day in the Unit, leave it unchecked.
2. Click **Use The Selected Date(s)**.
3. If the Unit is to be shared with other teachers, select the names of the other teachers.

### View Timeline

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1. In the **Sub Menu**, click **View Timeline**.
2. Click **Close** to return to the **Unit Plan List**.
3. To display a timeline for a particular Class, select the class from the All Classes drop-down list then click **View Timeline**.

### Jump to a Daily Plan

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1. On the calendar, click **Yesterday**, **Today**, or **Tomorrow**; or click a date on the calendar.
2. Dates for active Units are shaded in blue on the Calendar.
3. If a date is selected, all active Units for that day will be listed.
4. Under Daily Plans, click on the Daily Plan to view.

## Add New Unit from Plan Library

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1. Click **Add New Unit From Plan Library**.
2. Select a Course from **Courses** drop-down list.
3. In the **Plan Library Units box**, select a Unit from the list.
4. Edit the Title, if desired.
5. Select the Class from the drop-down list.
6. Confirm the Sections that will be included in this Unit. Select the School Calendar from the drop-down list to set the Start Date and End Date of the Unit; click the Calendar icon under Start Date. In the pop-up window, click on the date the Unit begins and click on the date the Unit ends.
7. Click **Submit Dates**.
8. If a day in the range of dates has been blocked, a message will appear. Either click in the checkbox to include the day in the Unit or leave unchecked to NOT include the date in the Unit.
9. Click **Use The Selected Date(s)**.
10. If the Unit is to be shared with other teachers, select the names of the other teachers.
11. Click **Add Unit**.

## Unit Actions

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### Edit

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1. Change the Title of a Unit
2. Select new Start Date or End Date
  - a. Click on the calendar icon
  - b. Click on **Reset** next to the Start Date to change when a Unit begins or click on Reset next to the End Date to change the date when a Unit ends.
  - c. Click on **Submit Dates** to confirm the date change
3. Check or uncheck next to the names of teachers to include or exclude teachers
4. Click **Update Unit** to save the changes

### Copy

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1. Enter a Unit title. The Title of the original Unit is shown above the Title box. It is not necessary to change the name of the copied Unit but it may be helpful to keep the originally planned Unit separate from the implemented Unit.
2. Select the Class from the drop-down list.
3. Confirm the Sections that will be included in this Unit.
4. Select the School Calendar from the drop-down list.
5. To set the Start Date and End Date of the Unit, click the Calendar icon under Start Date. In the pop-up window click on the date the Unit begins and click on the date the Unit ends.
6. Click **Submit Dates**. If a pop-up window appears, refer to the section on Blocked Dates.
7. Click **Copy Unit**.

**NOTE:** When a Unit is **shared**, all teachers sharing the Unit (other than the author) **must** Copy the Unit to their accounts **before** editing the Daily Plan.

## Shift Unit/Daily Plan

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### To shift the entire Unit to a Later date:

1. In the Calendar on the left, click on the first day of the Unit
2. Click **Later**.
3. Enter the number of days the Unit is to be shifted; the Calendar on the right will display the new Start Date and the impact the shifted timeline will have on the rest of the Unit.
4. Click **Shift Unit**.

### To shift the entire Unit to an Earlier date:

1. In the Calendar on the left, click on the last day of the Unit.
2. Click **Earlier**.
3. Enter the number of days the Unit is to be shifted; the calendar on the right will reflect the proposed changes.
4. Click **Shift Unit**.

### To shift a portion of a Unit to a later date: (this option is used for snow days, etc.)

1. In the Calendar on the left, click on the day to be moved.
2. Click **Later**.
3. Enter the number of days that portion of the Unit is to be moved; the calendar on the right will show the proposed shift.
4. Click **Shift Unit**.

## Delete

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1. Select **Delete** from the Actions drop-down list
2. In the pop-up menu, click **Yes** to delete the Unit. This action is PERMANENT.
3. A confirmation will appear indicating the Unit has been deleted. Click **OK**.

**Note:** A Unit cannot be deleted if its start date is before the current date or if any information has been added or checked in any of Daily Plan areas (Elements, Content, Skills, or Assessment).

## Deactivate

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1. Select **Deactivate** from the Actions drop-down list.
2. Click **Yes** in the pop-up window.
3. A message will appear that the Unit is inactive.

**Note:** In the Unit Plan List view, Inactive Units will not be displayed unless the **Show Inactive Units** is checked. Inactive Units are listed in grey.

## Activate

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1. Click the **Show Inactive Units** checkbox.
2. Click on the Unit.
3. Select **Activate** from the Actions drop-down list.
4. In the pop-up menu, click **Yes** to Activate the Unit.
5. A confirmation will appear indicating the Unit is Active.


## Daily Plan

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**Note:** The date highlighted in the calendar is the active day for the Unit. Make sure the correct date is highlighted before making changes to the Daily Plan

## Edit Elements

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1. To add information to an Element, click **Edit**.
2. A green border will appear around the Element
3. When finished editing an Element, click the disk icon to Save, the disk icon with the orange X to Save and Close, or the orange X to Exit without saving. If changes are made in an Element and the orange X is clicked, a warning will be displayed. 
4. To hide an Element Box, click **Hide**.

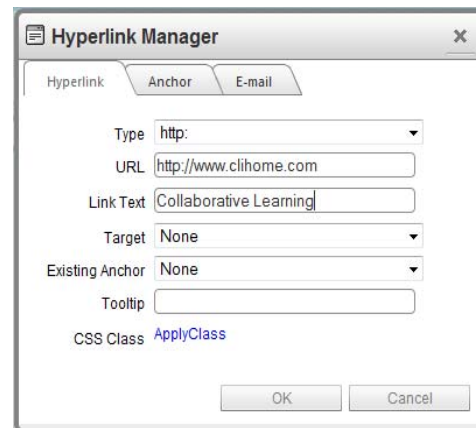
**Note:** Only *one* Element can be edited at a time. It is necessary to close one Element to edit another

## Hyperlinks

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A Hyperlink may be added to a Text Element by clicking the **Hyperlink Manager** icon.

1. Next to URL, type or paste the address of the website.
2. In **Link Text** box, enter a name associated with the link. In the example shown, Collaborative Learning will be what is seen in the Element.
3. Click **OK**.



The screenshot shows the 'Hyperlink Manager' dialog box with the 'Hyperlink' tab active. The 'Type' dropdown is set to 'http:'. The 'URL' text box contains 'http://www.clihome.com'. The 'Link Text' text box contains 'Collaborative Learning'. The 'Target' dropdown is set to 'None'. The 'Existing Anchor' dropdown is set to 'None'. The 'Tooltip' text box is empty. The 'CSS Class' text box contains 'ApplyClass'. At the bottom right are 'OK' and 'Cancel' buttons.



## Content, Skills, Assessment

### Add New Block

1. Choose a Title for the block if desired.
2. Click in the **Content** column to begin entering statements.
3. Hit the **Enter** key for the next letter in the outline (A, B, C, etc.).
4. Hit the **Tab** key for the next level in the outline (1, 2, 3, etc.).
5. Hit the **Shift** and **Tab** keys to return to the previous level in the outline.
6. Text entered in the **Content** column automatically populates the **Skills** column to maintain consistency and ensure column alignment.
7. Click in the **Skills** column to begin entering statements.
8. Click the disk icon to save the information.

**Note:** In Example A, the Content column has one outline level (A., B., C.). In the Skills column, the skills are in the second outline level (1., 2., 3.) In Example B, there are two outline levels in the Content column (A., 1., 2., 3.) which translates to skills occupying the third level in the Skills column (a., b., c.). The structure is set after the first Content statement is entered and cannot be changed within the Block (i.e., skills should be at the second or third outline level but not both).

#### Example A

Content, Skills, Assessment	
Title: Writing Traits	
Content	Skills
A. Ideas	A. Ideas
	1. Develops clear and focused ideas
	2. Develops a main idea with supporting details
B. Organization	B. Organization
	1. Writes in a way that follows a logical sequence
	2. Uses a variety of transitions to connect ideas and details
C. Voice	C. Voice
	1. Utilizes a personality and individuality to make writing unique to students
	2. Writes to connect with the audience using appropriate tone or mood

#### Example B

Title: Steps for Writing	
Content	Skills
A. Writing Process	A. Writing Process
1. Pre-writing	1. Pre-writing
	a. Develops ideas for writing
	b. Determines audience and purpose for writing
2. Draft	2. Draft
	a. Writes first draft
3. Revise	3. Revise
	a. Uses resources that are available to improve writing
	b. Revises to make changes to improve the meaning of language in writing
	c. Edits to make changes to improve grammar in writing
4. Edit/Final Draft	4. Edit/Final Draft
	a. Creates a final draft
	b. Publishes writing in a variety of methods
	c. Shares writing with others in a variety of methods

## Assessments

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### Adding an Assessment

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1. Click **Edit Block**.
2. Click **Add Assessment**.
3. Provide a Description and Notes if desired (these are Options).
4. If the Instruction Planner administrator has entered Assessment Types, click on those that reflect the type of assessment.

### Associating an Assessment with Content or Skills

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1. While in the Assessment window, click **Content & Skills**.
2. In the window, click on the content or skills associated with the Assessment.
3. Click **Save Assessment**.

### Adding Documents to Assessments

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1. While in the Assessment window, click **Documents**.
2. Select the Library from the pull-down list.
3. Click in the box next to the file or files to be attached.
4. Click **Save Assessment**.

### Attaching Standards to Assessments

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1. While in the Assessment window, click **Standards**.
2. Click in the checkboxes next to the Standards to be attached.
3. Click **Save Assessment**.

### Remove Attached Standards

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1. In the Assessment column, click on the Assessment with the attached Standards.
2. Click on **Standards** (any Standard attached will be checked).
3. Uncheck Standards to be removed (un-checking all Standards will remove the Standards as well as the icon).
4. Click **Save Assessment**.

## Standards

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### Add Standards

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1. In the Standards section of either Unit Plan or Daily Plan, click the **Select Standards** icon .
2. Select the Standards Set, Subject, and Level from the drop-down menu.
3. Click in the box(es) to the left of the desired standard(s).
4. Click **Add Standards** to add selected standard(s) to the Unit.
5. Repeat the previous steps to add standards from another Set, Subject, and/or Level.

**Note:** It is possible to Search the Standards, if so desired. If the Unit involves “main ideas,” that term can be entered in the Search box. Instruction Planner will display all standards with that term. Typing in the beginning letters of a word will display all variations of a term (e.g., classify will display: classify, classification, classified, classifying, etc.)

## Search Standards

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1. To search for a specific term within the Standards, type search word in box to the right of **Search**.
2. Click in the box (es) to the left of the desired standard(s).
3. Click **Add Standards** to add selected standard(s) to the Unit.
4. Repeat steps 1-5 to add standards from another Set, Subject, and/or Level.
5. Edit or remove selected Standards by clicking in the box to the left of the appropriate standard to remove the check.
6. As appropriate, click **Cancel** or **Add Standards** at the bottom of the page.
7. The Standards Block can be collapsed by clicking **Hide** and expanded by clicking **Show**.

**Note:** Typing “classif” will return all words beginning with those letters (classification, classifying, classify)

## Attach Standards

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1. Place the cursor on the line where Standards are to be attached.
2. Click the **Select Standards** Icon.
3. Only previously added Standards will be displayed.
4. Click the box to the left of a Standard to select that Standard (multiple standards can be checked)
5. Choose **Introduced**, **Developed**, or **Reinforced** from the pull down list if desired.
6. Click **Attach Standards**.
7. To hide the standards list, click the **Select Standards Icon**.

## Edit Standards

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1. Place the cursor at the end of the line above the Standards icon,
2. Click the **Select Standard** icon to show the checked standard(s).
3. To remove an attached Standard, uncheck the box next to the Standard.
4. To add a Standard, place a check in the box next to the Standard.
5. Click **Attach Standards**.
6. To hide the standards list, click **Select Standards** icon.

## Remove All Attached Standards and Delete the Standards icon

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1. Place the cursor at the end of the line above the Standards icon.
2. Click the **Select Standard** Icon to show the checked standard(s).
3. Uncheck all boxes next to the Standards.
4. Click **Attach Standards**.

## Document Library

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### Add New File (Upload)

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#### From the Unit Plans List view

1. To add a file to a Document Library, select **Resources** from the Menu Bar.
2. Select **Document Library**.
3. Click **Add New File**.
4. Read the Terms of Use and click **Agree** to continue. (Clicking **Do Not Agree** will cancel the operation)
5. Click **Browse**; navigate to the file location.
6. Choose **Share Option**.
7. If a different title is desired, type in the new file name. If left blank Instruction Planner will insert the file name.
8. Type in a Document Description.
9. Select a Category.
10. Select a File Type.
11. Select the Library or Folder within a Library. (See Add New Folder section)
12. Click **Add File**.

**Note:** The Share Option provides a level of access to documents when they are attached to plans. Documents in a Personal Library that are not attached to a plan are only viewable by the individual who creates the file.

#### From the Content, Skills, Assessment window

1. Click in the column where the Document is to be attached.
2. Click on the **Select Documents** icon.
3. Click **Upload**.
4. Enter **Document Title** and **Description**, select **Category**, **File Type**, and **Library**.
5. Click **Add File**.
6. Click the box next to the desired document(s).
7. Click **Attach Document; Save**.
8. To close, click **Select Documents** icon.

### Attach Documents

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1. Click **Edit Block**.
2. Click on the line where the document will be attached.
3. Click the **Select Document** icon.
4. Check all documents to be attached.
5. Click the **Attach Documents**.

### Delete Attached Documents

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1. Click on the line above the document icon.
2. Click on the **Select Documents** icon.
3. Uncheck the document or documents to be deleted.
4. Click **Attach Documents**.

## Daily Plan Actions

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### Copy

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1. Click on the Unit; click **Daily Plan**.
2. Click a day in calendar.
3. Complete the information for that particular day.
4. Choose **Copy** from the **Actions** drop-down list.
5. Click on the day the Daily Plan will be copied.
6. Click **Copy Daily Plan**.
7. If a Daily Plan is to be repeated for multiple days, repeat steps 4 through 6.

### Deactivate/Activate

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1. Click on the Unit; click **Daily Plan**.
2. Click a day in calendar.
3. Choose **Deactivate** from the **Actions** drop-down list. If a day is Deactivated, select **Activate** from the **Actions** drop-down list.

### Reality Check

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1. Click **Reality Check** at top of Unit Plan or Daily Plan page.
2. Items in the Content, Skills, and Assessment columns that have been checked in the in Daily Plan(s) will have checkboxes selected.

### Send to Curriculum Mapper

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1. Click **Send To Curriculum Mapper**.
2. Click **Preview Map** to view curriculum map before sending to Curriculum Mapper.
3. Click **Send to Curriculum Mapper** to create a map in Curriculum Mapper. Only items checked in the Daily Plans in the Content, Skills, and Assessment columns will be sent to Curriculum Mapper.

## Reports

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### Elements Report

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1. Click **Reports**.
2. Choose **Elements Report**.
3. Select **Class** and **Unit Plan**.
4. Select the Element(s) to be included in the report.
5. Click **Run Report**.

### Daily Plan Report

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1. Click **Reports**.
2. Choose **Daily Plan Report**.
3. Choose day on calendar.
4. Choose Element(s).
5. Click **Run Report**.

## Setup

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### Add New Class

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1. From **Setup**, choose **Class**.
2. Confirm school year.
3. Click **Add New Class**.
4. Select the appropriate course from the drop-down list.
5. Type in a Section Name.
6. Click **Add Class**.
7. To add additional Sections, click **Add Section**.

**Note:** All classes must have at least one section. In an elementary school, this might be the name of the teacher, the time of the class, etc.

### Calendar: Add New Events

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1. From **Setup** choose **Calendar**.
2. Click **Add New Events**.
3. Select the start and end date of the event.
4. Click **Submit Dates**.
5. Select the Event Type from the drop-down list.
6. Type the description that will appear under Description in the list of events.
7. Click in the box next to **Blocked Dates?** if the date should not be used.

### Add Template

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1. From **Setup**, choose **Template** to see list of existing Templates.
2. Click **Add Template**.
3. Select a Template from the drop-down list to edit an existing Template, or select Blank
4. Name the Template. It is possible, though not advisable, to have more than one Template with the same name.
5. Drag and drop the Elements to the desired location within the Template areas. To remove an Element, drag it to the Available Elements list and drop it.
6. Click **Save Template**.
7. To create a Template for the Daily Plan, click **Daily Plan**. Elements can be in both the Unit Plan and Daily Plan.

**Note:** If an existing Template, created by an Instruction Planner administrator, is used then Elements can be added but not moved or deleted. Selecting a Blank Template allows the user to place Elements in any location within the Template.

**Note:** A Template can be created for the Unit Plan and for the Daily Plan. The Elements in the Daily Plan are tracked and monitored as the Daily Plans are completed.

## Admin

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### Assessment Types

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1. From **Admin**, choose **Assessment Types**.
2. Click **Add Assessment Type**.
3. Enter the name for the assessment.
4. Click **Add Assessment Type**.
5. To change the name of an Assessment Type, click **Edit**; type in the new name and click **Save Assessment Type**.
6. To Delete an Assessment Type, click **Delete**.
7. In the window, click **Yes, Delete Assessment Type**.

### Add Events to School Calendar

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1. From **Admin**, choose **School Calendar**.
2. Be sure the correct calendar year is displayed.
3. Click **Add New School Events**.
4. Select the start and end dates of the Unit; click the start date calendar.
5. Click **Submit Dates**.
6. Identify the Event Type from the drop-down list.
7. Type is a Description that will be displayed in the teacher calendar.
8. Click in the box next to **Block Dates?** if the event is a non-teaching day.
9. Click **Add Event**.

### School Courses

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1. From **Admin** choose **School Courses**.
2. To add new course, click **Add New Course**.
  - Name the course.
  - Assign course number.
  - Choose subject area.
  - Choose grade level(s).
  - Complete (as appropriate) course description, textbooks and materials, prerequisites, notes, credit earned, college credit, course level, length of course.
  - Mark **Active** or **Inactive**.
3. Click **Add This Course**.
4. To edit or delete a course, click **Edit** or **Delete**.

### School Plans

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1. From **Admin**, choose **School Plans**.
2. Choose Calendar.
3. Choose Course.
4. To show inactive plans, click checkbox **Show Inactive Plans**.
5. To view Unit plan, click Unit name.
6. From Unit plan, click **Daily Plan** to view daily plans.
7. Click date on calendar to view another daily plan.
8. Click **Reality Check** to view a reality check.



## School Settings

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1. From **Admin**, choose **School Settings**.
2. Choose **Yes** or **No** for each **Permission**.
3. Complete **Conventions** and **Standards Coverage**.
4. Click **Update**.

## School Templates & Elements

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1. From **Admin** choose **School Templates and Elements**. A list of existing Templates and Elements will be displayed.
2. Scroll to **Elements**; choose **Add Element**.
3. In next screen, name the Element and choose **Element Type**.
  - If element type is **Text**, click **Add Element**.
  - If element type is **List**, choose **Bullet List** or **Number List**; click **Add Element**.
  - If element type is **Checkbox**, click **Add New Item**, repeating **Add New Item** for each choice for checkbox; click **Add Element**.
  - If element type is **Drop-down List**, click **Add New Item**, repeating **Add New Item** for each choice for drop-down list; click **Add Element**.
4. Choose **Add Template**.
5. Name Template.
6. If Template is to be active, choose **active**.
7. If Standards are to be included, choose **Include Standards**.
8. For Unit Plan, choose **Unit Plan**.
  - For **Template Area #1**, provide a Title, if desired.
  - From **Available Elements**, choose Element(s); click and drag to location.
  - If another row is needed, click **Add New Row**.
  - Repeat for **Template Area #2** and **Template Area #3** as needed.
  - Scroll to bottom of screen; click **Save Template**.
9. For Daily Plan, choose **Daily Plan**.
  - For **Template Area #1**, provide a Title, if desired
  - From **Available Elements**, choose Element(s); click and drag to location.
  - If another row is needed, click **Add New Row**.
  - Repeat for **Template Area #2** and **Template Area #3** as needed.
  - Scroll to bottom of page; click **Save Template**.
10. To edit or delete a Template or Element, choose **Edit** or **Delete**.